**APPEAL GUIDELINES and APPLICATION FORM**

The Roger & Douglas Turner Charitable Trust CIO (Registered Charity 1154467) generally makes grants to Registered Charities in Birmingham, the four Black Country boroughs (Wolverhampton, Sandwell, Walsall, Dudley), and in Worcestershire (the ‘beneficial area’). Some grants are made in the Solihull MBC area at Trustees’ discretion.

Appeals are generally not accepted from areas outside those described above, since the charity does not have sufficient resources to make grants in the wider West Midlands, other regions, or overseas. However, appeals may be considered from national or regional charities who can demonstrate charitable work/public benefit in the above area(s).

The Trust awards grants to registered charities only. The Trust does not give grants to individuals, Community Interest Companies, social enterprise or other not-for-profit organisations. The Trust does not support charities that have access to significant private sector funding, or charities with large defined-benefit pension fund deficits

Appeals may be for a project, capital expenditure or for core costs – but not for an individual’s salary.

The Trustees generally meet in March, June, September and December. Please contact to ask for the latest date for submission of an appeal, as actual dates will vary. Appeals arriving late will be retained and carried over to the following meeting. Incomplete appeals will be discarded if information is not received within 12-months of the initial appeal being received.

Most grants made by the Trust are in the area of £1,000 to £3,000, so appeals for large sums for core funding are usually returned for resubmission, in the interests of the applicant. Appeals for larger capital grants, however, may be considered. Please do not appeal for a project until its financial viability is clear – i.e., if you are only just beginning to fund-raise and it may not start for a year or so. You must specify the amount you are appealing for otherwise your appeal will be referred back to you.

The Trust has a one-page Application Form. Applicants should complete the form, and return it to the address shown, or email it to [jenny@turnertrust.co.uk](mailto:jenny@turnertrust.co.uk) . Please ensure the appeal form remains on a single page.

Along with your application form please send:

1. A short, supplementary letter (not more than two pages) on letter heading - if it helps to explain the appeal in more detail.
2. A copy of a bank giro credit/paying in form.

Applicants are also welcome to telephone the Trust for guidance on timing or any other aspects of an application Telephone: 01299 861368 / 848252.

Applications are not acknowledged immediately (unless they are unsuitable or an amendment is required). However, all applications are acknowledged, generally after the Trustees’ quarterly meeting.

The Trustees’ decision is final, and they do not give a reason why an appeal is supported or declined.

**Supplementary notes from application form (marked as \* and \*\*)**

1. If your charities income is below the Charity Commission threshold for submitting an annual report, please ensure that you enclose a copy of your annual return with your application
2. Reportable incidents can be found on the Charity Commission website. Examples table is [here](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/752170/RSI_guidance_what_to_do_if_something_goes_wrong_Examples_table_deciding_what_to_report.pdf) or found at [www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity](http://www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity)

**Send your application to**:

***Post:*** Jenny Harris Grants Manager

The Roger & Douglas Turner Charitable Trust

Arley House, Lion Lane

Upper Arley, Bewdley

Worcestershire. DY12 1SQ.

***e-mail:*** [jenny@turnertrust.co.uk](mailto:jenny@turnertrust.co.uk)

**The Roger & Douglas Turner Charitable Trust Application for a Grant**

***Applicants should complete the form, print and sign it, and return it via email or to the address shown***

|  |  |
| --- | --- |
| Name of Applicant Charity |  |
| Registered Charity Number |  |
| Ultimate parent charity (if any) |  |
| Name of person applying |  |
| Position in Charity |  |
| e-mail address for correspondence |  |
| Telephone number |  |
| Postal / Mail address |  |
| *Include Post Code* |  |

**Is the application for?** **Core work costs (Yes / No) A Project (Yes / No) Capital costs (Yes / No)**

***Please describe the reasons for the application*** ………………………………………………………….……………………….………………

………………………………………………………………………………………………………………………………………………………….………………..

……………………………………………………………………………………………………………………………………………………….……………………

………………………………………………………………………………………………………………………………………………………….………..…….…

……………………………………………………………………………………………………………………………………………………………………..………

………………………………………………………………………………………………………………………………………………………………………..……

…………………………………………………………………………………………………………………………………………………………………………..…

…………………………………………………………………………………………………………………………………………………………………………..…

***Please give some facts / figures to help the Trustees understand the size/ scale of your work:***

Approximately how many beneficiaries do you support each year? ………………………………………………………….….........

How many people are expected to benefit from your work in our beneficial area? ................................................

How much are you appealing for from our Trust? £……………………………………………………………………………….……………..

List other grant-making bodies to which you applied (e.g., Trusts, Lottery, etc.?)....................................................

………………………………………………………………………………………………………………………………………………………………….………..…

***(This section to be completed only for a project or a capital application):***

What is the cost of the project? £..................... When does it start? ...............................................................

How much are you trying to raise? £..................... How much have your raised already? £...............................

How much will your organisation contribute towards the project? £……………..…………….…………..………………….….

**For all appeals please**:

Tick here to confirm that you have enclosed your Supporting Letter

Tick here to confirm your latest Annual Report is on the Charity Commission website **\*(see note 1 in guidelines)**

Confirm if you have a safeguarding policy in place for your vulnerable beneficiaries **Yes No N/A**

**All appeals:** **Declaration about your charity. Over the last ten years, has your charity had any reportable incidents to the Charity Commission for any reason?** **Yes No**

(If you answered yes, please provide details on a separate sheet).**\*\*(see note 2 in appeal guidelines)**

***In the event of a successful application, the Trustees make grants by direct credit.***

Tick here to confirm that you have included a copy of a bank giro/credit/paying in form

***General Data Protection Regulation 2018:*** By signing below, applicants to agree to the use of any personal data for the Trust’s legitimate interests. A copy of the Trust’s Privacy Policy may be obtained upon request.

Your Signature…………………………………………………………………………………………………..….Date……………/……..…/………………

***Post or e-mail this form to*:** Jenny Harris,Grants Manager, The Roger & Douglas Turner Charitable Trust, Arley House, Lion Lane, Upper Arley, Bewdley, Worcs DY12 1SQ [jenny@turnertrust.co.uk](mailto:jenny@turnertrust.co.uk)